



IDP for Supervisors

Module 4: Manage Phase Responsibilities



What Is Your Role in the Manage Phase?

After the IDP has been approved and activated in SATERN, the **Manage** phase begins. Your responsibilities during this phase include supporting the employee's training and development, and monitoring progress of development activities.

This module will cover the following tasks:

- Supporting Training & Development Activities
- Running Employee Reports
- Meeting with the Employee to Review Progress





Support Training & Development Activities

Now that the IDP is approved, both the employee and the supervisor will implement the plan. The employee will begin to schedule and complete the activities outlined in the plan.

However, the employee may encounter problems with accomplishing developmental goals, or need your guidance in executing the plan.

Ways you can offer support:

- Provide access to resources (e.g., funding, mentors, etc.)
- Approve enrollment requests for academic classes, conferences, and training courses, submitted through SATERN
- Help the employee with the nomination or registration processes
- Assist the employee in developing an action plan for developmental assignments or on-the-job training
- Get involved before and after training to maximize the employee's developmental experience





Run Employee Reports

As a supervisor, you can run reports in SATERN that will help you monitor the progress the employee has made toward IDP goals and to see what learning activities have been completed. You may find it helpful to print and review employee reports in preparation for supervisor-employee meetings where you discuss the IDP.

SATERN allows you to generate a number of different standard reports. All reports have the same options to describe how you wish to run the report.

Tip: You must be viewing your own records in order to access all reporting options.





Run Employee Reports (cont.)

To run a report, select **Reports** from the main menu. There are two SATERN reports that directly relate to monitoring IDP progress:

- Individual Development Plan
- Learning History

Report Name
Curriculum Status
Individual Development Plan
Item Requests
Item Status
Learning History
Learning Hours
Learning Needs
Learning Plan
Tuition
Learner History Combined





Run Employee Reports (cont.)

The **Individual Development Plan** report includes data on:

- Goals
- Development activities
- Comments
- Progress made toward goals and activities

Individual Development Plans			
Learners			
User Name:	*****		
Learner Name:	Nasa, Joe		
Development Plans			
Plan Title:	Systems Engineering Plan	Plan Period:	One year
Plan Status:	Inactive/Approved	Version:	1
Effective Date:	2/13/2008 12:00 AM EST	Expiration Date:	2/13/2009 12:00 AM EST
Approval Date:	12/22/2007 04:39 PM EST		
Plan Comments			
Created By:	Coach/Mentor, Nasa, Jane - 12/21/2007 02:54 PM EST		
Comments:	Overall, I'm happy with your plan. I'd like to see you take an introduction to systems engineering class before you do the other two courses, and we should talk about ways to bolster your application to NASA FIRST. Good work.		
IDP Sections			
Section Name:	SHORT-RANGE GOALS: 1 YEAR		





Run Employee Reports (cont.)

The **Learning History** report includes data on:

- Completed catalog items
- External development activities completed and recorded by the learner
- External development activities completed via the NF-1735 process

Learner Learning History

Learner

User Name: *****Learner Name: Nasa, Joe

Item Events

Item ID	Title	Completion Date	Grade	Status
READING SS-SKILLSOFTPREREQ2007 (Rev 7/5/2007 06:03 PM EST)	Getting Started With NASA's SkillSoft e-Learning and Books 24x7 Programs	1/12/2008 08:09 PM EST		Completed

Learner

User Name: *****Learner Name: Nasa, Joe

External Events

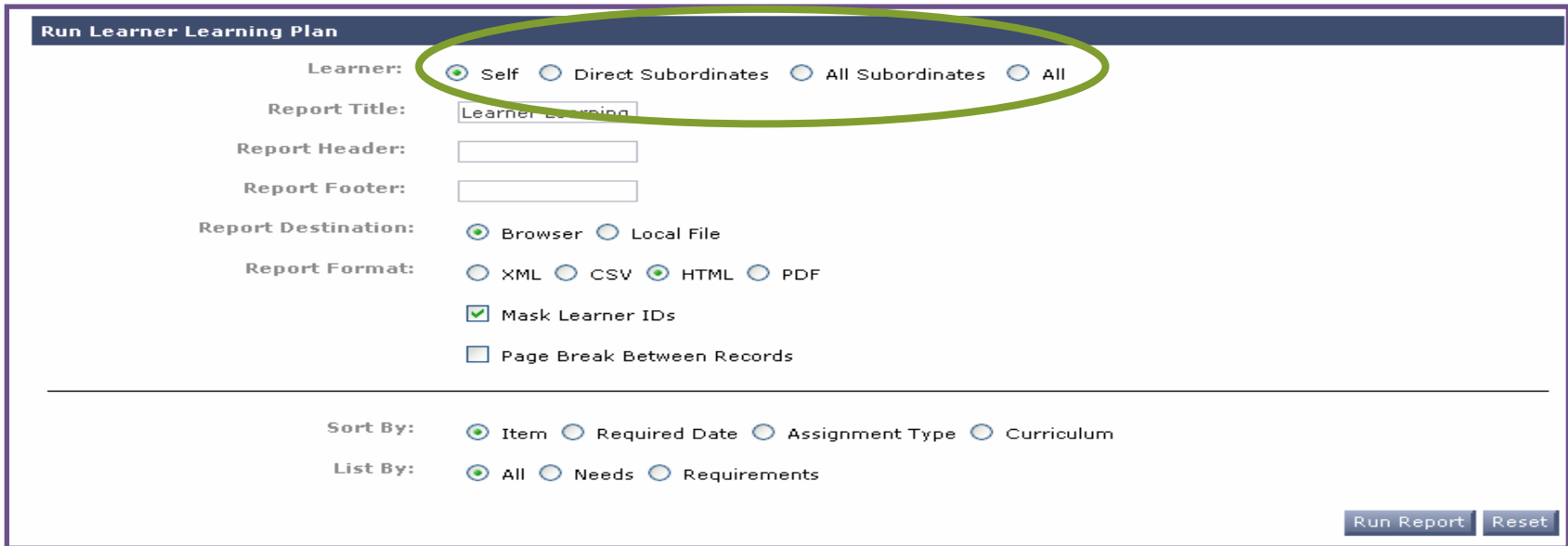
Description	Completion Date	Grade	Status
Systems Engineering 101 Tutorial	12/28/2007 12:27 PM EST		

1/17/2008 07:47 PM EST



Run Employee Reports (cont.)

After you select a report, you will have a choice of running a report for yourself, your direct reports, all in your chain of command, or all.



The screenshot shows a web form titled "Run Learner Learning Plan". The "Learner:" section is circled in green and contains four radio button options: "Self" (selected), "Direct Subordinates", "All Subordinates", and "All". Below this, the "Report Title:" field contains the text "Learner Learning". The "Report Header:" and "Report Footer:" fields are empty. The "Report Destination:" section has two radio button options: "Browser" (selected) and "Local File". The "Report Format:" section has four radio button options: "XML", "CSV", "HTML" (selected), and "PDF". There are two checkboxes: "Mask Learner IDs" (checked) and "Page Break Between Records" (unchecked). At the bottom, the "Sort By:" section has four radio button options: "Item" (selected), "Required Date", "Assignment Type", and "Curriculum". The "List By:" section has three radio button options: "All" (selected), "Needs", and "Requirements". In the bottom right corner, there are two buttons: "Run Report" and "Reset".

You also have a number of choices regarding report display options.





Run Employee Reports (cont.)

If you need to run a report for only one employee, select **My Employees** from the main menu, select the employee, and **Change to Selected Learner**.

The screenshot shows the SATERN system interface. At the top, there is a navigation bar with links: Welcome Jane Nasa | Home | Search Catalog | Go | Help | Logout. Below this is a main menu with tabs: Personal, Learning, Career, Catalog, Reports, and My Employees. The 'My Employees' tab is highlighted with a green oval. Below the main menu, there is a breadcrumb trail: Subordinates > Learning Plans > Assessments > Development Plans. The main content area is titled 'Employee Subordinates' and contains a description: 'This menu option allows you to view the learning data of Subordinates in your reporting hierarchy. Select the direct report whose data you wish to view or click the Expand icon to drill down through the reporting hierarchy. To return to your own learning records, click the link at the top of the screen labeled Return to Your Records.' Below this description is a button labeled 'Change to Selected Learner'. A table titled 'Subordinates' is displayed with the following columns: Learner Name and Select. The table lists three subordinates: Nasa, Joe; Nasa, Joe; and Space, Nancy. The 'Select' column for each row contains a radio button, which is highlighted with a green oval.

Learner Name	Select
Nasa, Joe	<input type="radio"/>
Nasa, Joe	<input type="radio"/>
Space, Nancy	<input type="radio"/>

Then from the **Reports** menu, select the report you wish to run for that individual.





Meet with the Employee to Review Progress

The IDP is designed to be a realistic working plan and may change over time as priorities and needs change. The IDP should be reviewed periodically to ensure that the activities continue to be current and worthwhile in supporting the intended objectives and goals. You should meet with the employee to follow up on IDP progress.

During this meeting the you can:

- Discuss the employee's progress toward goals and confirm that progress is being recorded in SATERN
- Evaluate the effectiveness of the training and determine if the development activities are meeting development needs
- Provide advice on any changes or mid-term adjustments that may be necessary
- Agree on modifications to the IDP and when they will be made





Meet with the Employee to Review Progress

When an employee revises his/her IDP, the IDP will receive a new version number. All previous versions will be retained.

When an employee revises his/her IDP by adding or removing goals or activities, the IDP will be re-submitted to you for approval.

Personal	Learning	Career	Catalog	Reports
▪ Development Plan ▪ View Your Competencies				
Your Current Development Plan				
The details of this individual development plan are shown below. If this plan is currently Active, you may update the status of certain activities and view or add notes to this plan. If you have permission and the plan is revisable, choose the Revise option. To select another development plan, choose the View Other Plans option.				
Systems Engineer				
Plan Period: One year		Expiration Date: 1/14/2009 12:00 AM EST		Coach/Mentor: Nasa, Jane
Plan Status: Active/Approved		Approval Date: 2/29/2008 02:25 PM EST		Plan Purpose: To support a career shift to systems engineering
Version: 1 (This is the most recent version)		Effective Date: 1/14/2008 12:00 AM EST		
<div>View/Add Notes Revise... View Other Plans</div>				





Summary

- The IDP is tool that can be used to discuss career goals, career development, and expertise development activities with your direct reports.
- The planning and communication between employees and supervisors is a beneficial aspect of creating an IDP.
- You are responsible for initiating discussions with your direct reports about Individual Development Planning, and for approving IDPs.
- It is important to meet periodically with your employees to track progress and to adjust the plan if necessary.
- For additional information on the IDP, go to <https://saterninfo.nasa.gov>.